

Dear Valued Client:

Re: The Underwriter's Workstation – Important Releases and Changes

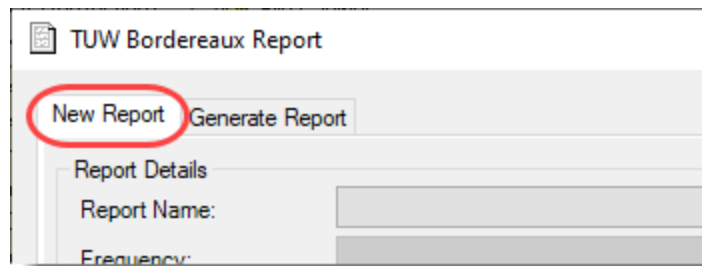
Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and new features to The Underwriter's Workstation (TUW):

Improvements to TUW Bordereaux Report

Improvements have been made to the TUW Bordereaux Report. This report enhancement includes the following changes:

- When creating or editing a report, click the **Modify** button to select Company Rating Details, Contracts, Transaction Types, and Policy Codes in the pop-up window.
- Use the **Column Editor** to select and manage columns that will appear in the report.
- Columns added to the report will display in the improved **Report Setup** section, where you can view, filter, organize, modify, and delete report columns as needed.
- You may notice other minor changes in the report display.
- **Lineage upload** is now accessed directly from the **Reports** menu (by clicking Reports, Lineage Bordereaux Report in the TUW window).

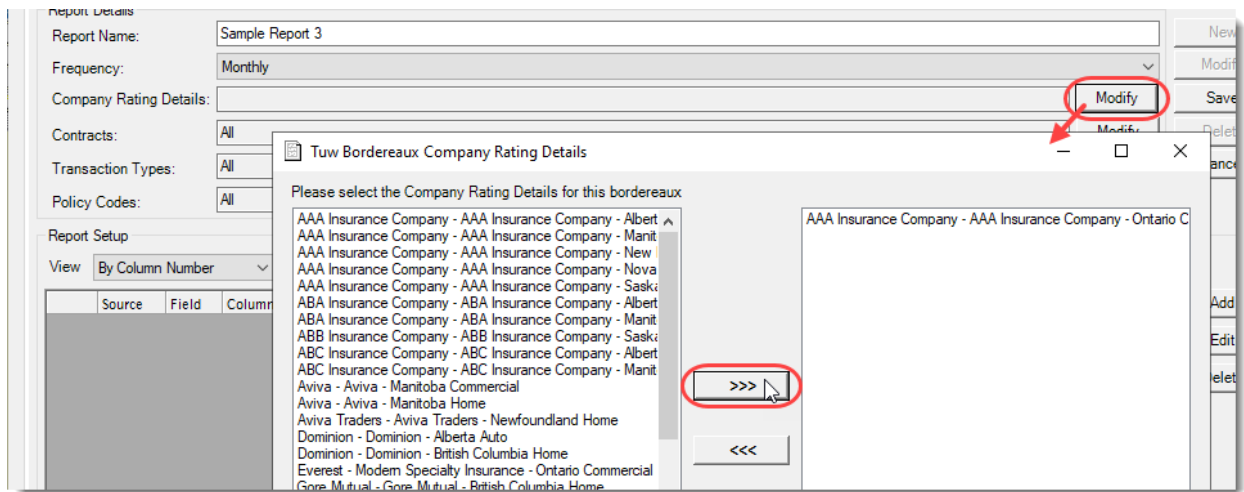
To open the TUW Bordereaux Report form, click **Reports, Bordereaux Report**. You can create a new report or modify an existing report on the **New Report** tab.



Please note the following changes when creating or editing a report.

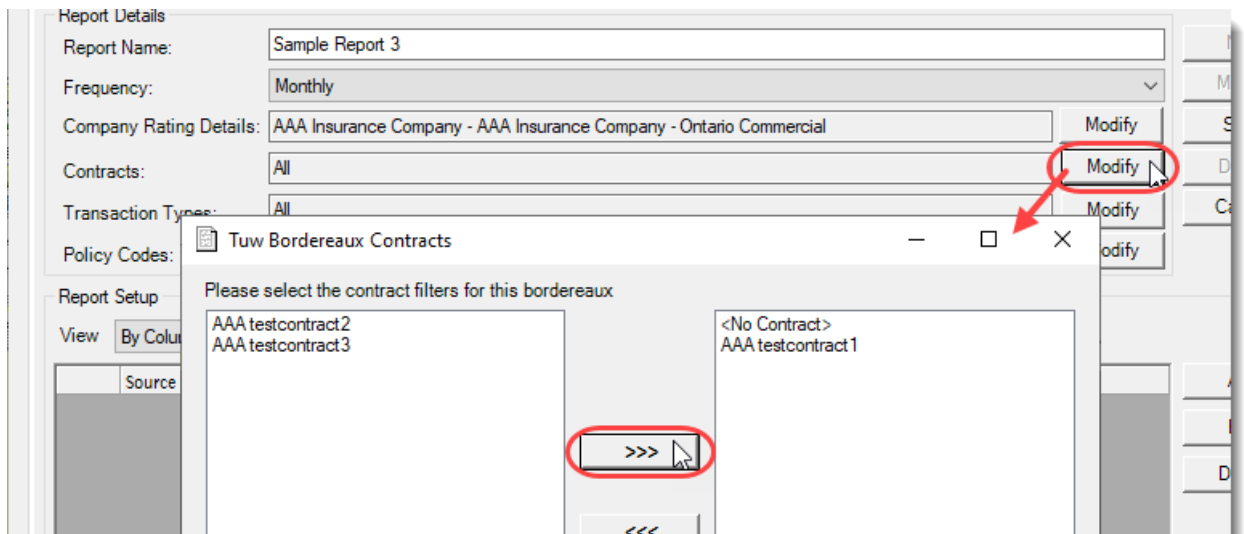
To select **Company Rating Details**, click the corresponding **Modify** button. In the Company Rating Details window, select an item and click the Add button. Repeat to add additional items as needed. Click OK.

- If an item is added in error, select it in the right pane and click the Remove button.
- The selection(s) will show in the Company Rating Details field.



To select **Contracts** to include in the report, click the Modify button and add one or more contracts in the Contracts window.

- Please ensure all valid contracts are selected, as report results will include only specified contracts.
- This includes the <No Contract> option (if you select this option, please also specify any other valid contracts for this report).
- If no contract filters are selected, the report will be generated with an assumption of all contracts selected.

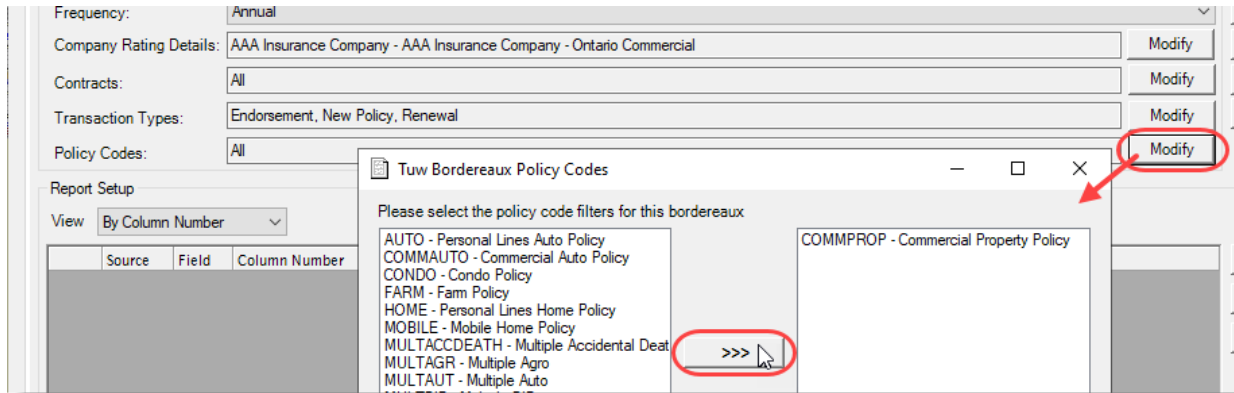


To select **Transaction Types** to display in the report, click the Modify button and add one or more document categories in the Document Categories window.

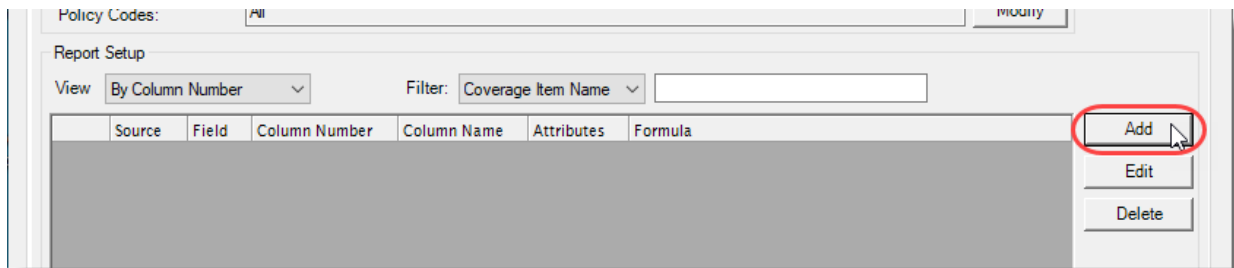
- Please ensure all applicable document categories are selected, as report results will include only specified categories.
- If no document category filters are selected, the report will be generated with an assumption of all document categories selected.

To select **Policy Codes**, click the Modify button and add one or more policy codes in the Policy Codes window.

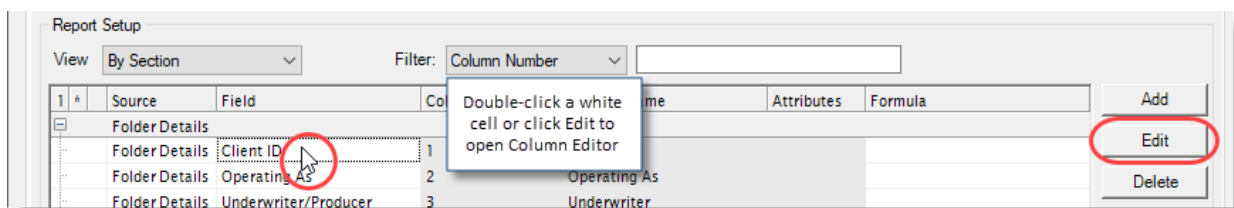
- When policy code filters are set, report results will include only policies where those policy codes exist on one or more subscription lines.
- If no policy code filters are selected, the report will be generated with an assumption of all policy codes selected.



In the **Report Setup** section in the Bordereaux Report form, you can view, filter, organize, modify, and delete columns appearing in the report. Any columns that have already been added to the report will display in this section. To add a new column, click the **Add** button to open the **Column Editor** ([see more below](#) about the Column Editor).

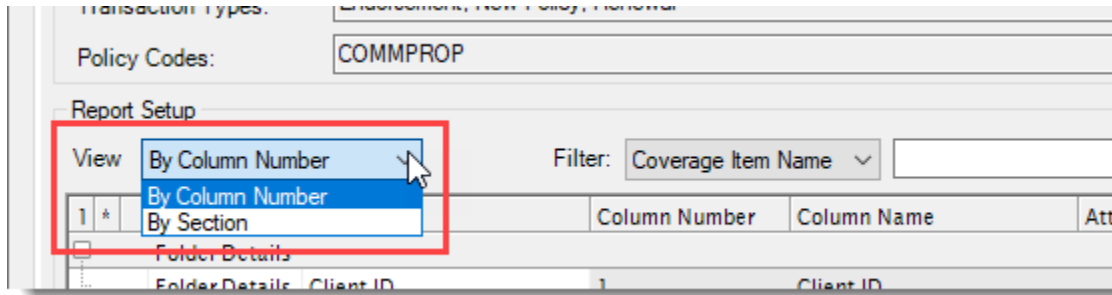


After columns have been added, you can return to the Column Editor as needed to add or edit columns. Click the **Edit** button or double-click a column in the Report Setup section to open the Column Editor. (Double-click a white cell, rather than a shaded cell. A shaded cell indicates that information can be edited directly in the Report Setup section.)



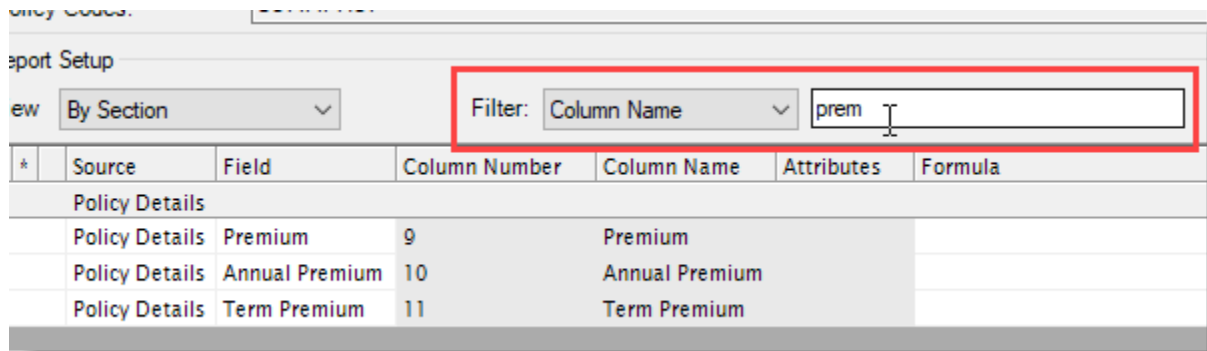
You can **View** columns by Column Number or by Section.

- Choose **By Column Number** to view the list of columns ordered as they will appear in the report. Select **By Section** to view columns organized by section (as shown in the Source column). Within each section, columns will be sorted chronologically by column number.
- If a column number is changed, please reselect the View to refresh the display.

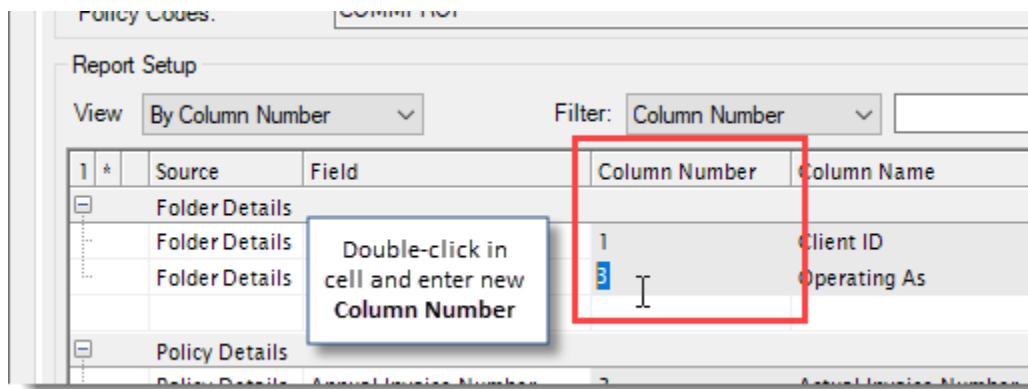


The **Filter** can be used to find target item(s). Select the Filter type (Coverage Item Name, Column Name, or Column Number) and enter one or more target characters for the search. The list will reload, displaying only item(s) matching those parameters.

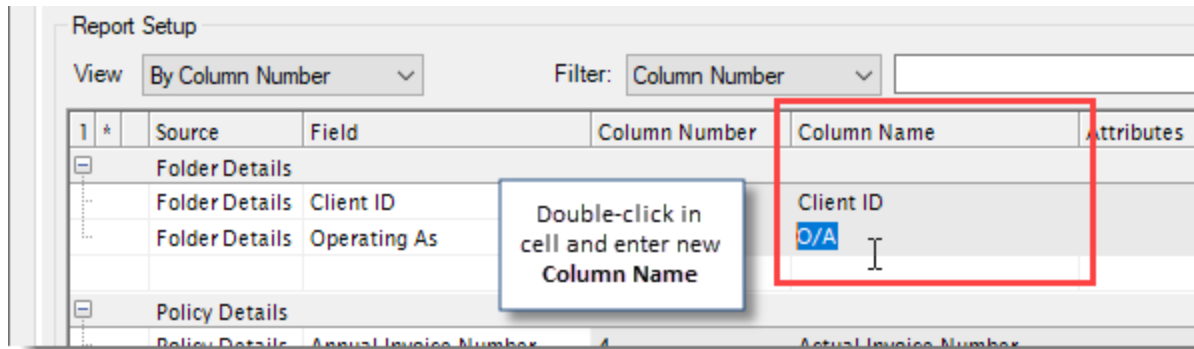
- Note that the filter is not case sensitive.
- Delete the characters entered in the Filter field to view the full list again.



To change a **Column Number** (to adjust the column order in the report), double-click in the cell and enter the new number. If a column number is changed or a column is added between two existing columns, the report will be renumbered automatically.

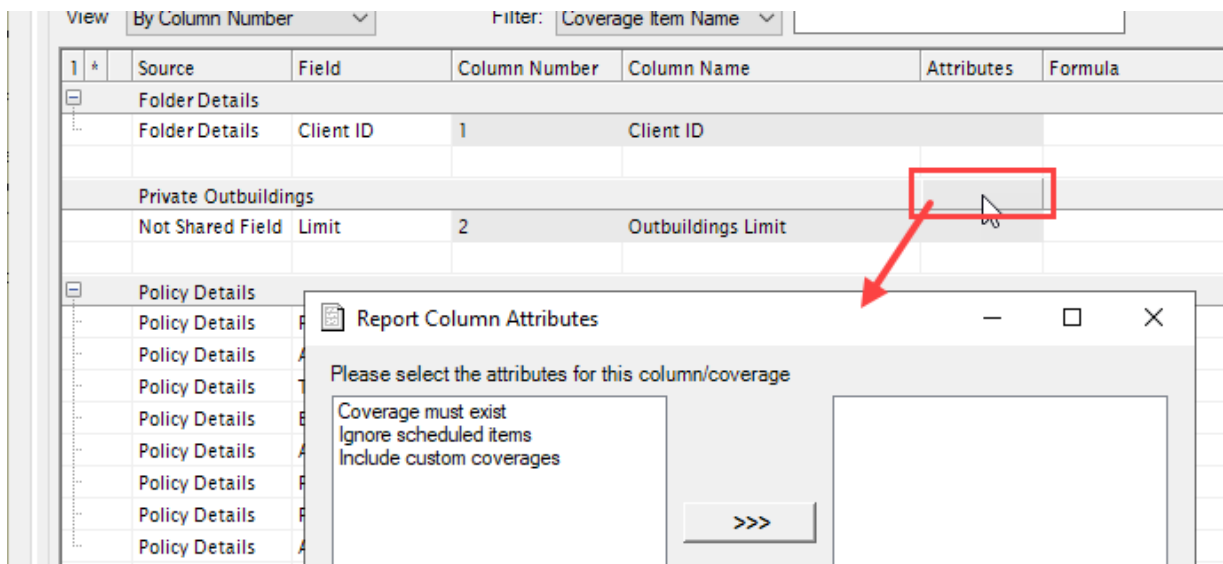


The **Column Name** (the name that will appear in the report) will default to the original Field name, but this can be changed as needed. To adjust the column name, double-click in the cell and enter the desired name.

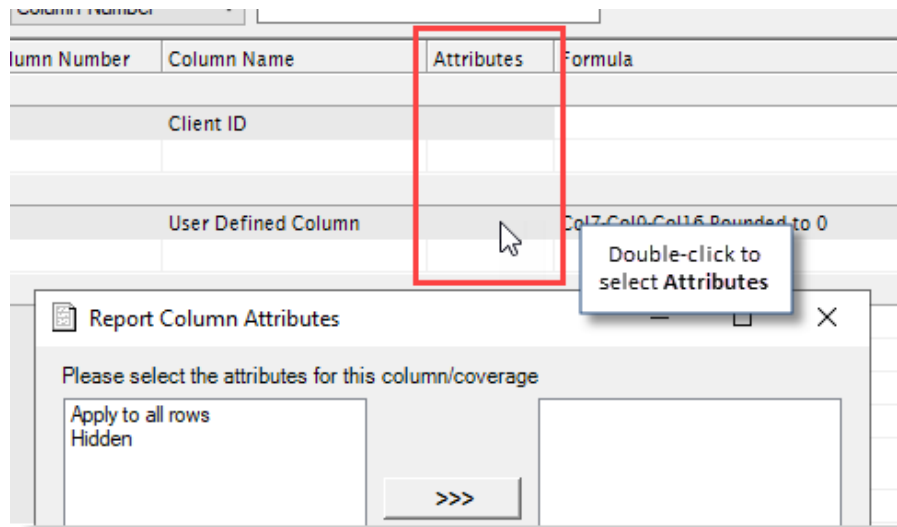


The **Attributes** column allows you to manage attributes for the coverage item (Coverage Attributes) and its fields (Row and Column Attributes).

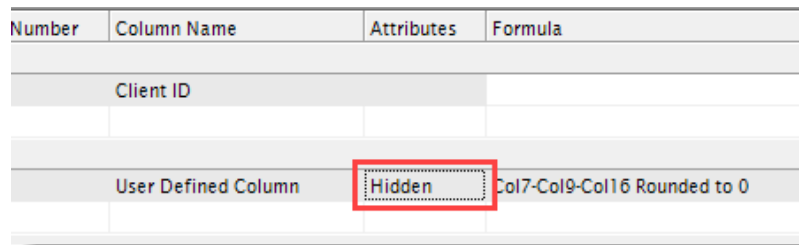
- To manage **Coverage Attributes**, double-click in the Attributes field for the Coverage Name. In the Report Column Attributes window, select applicable attribute(s) (Coverage must exist, Ignore scheduled items, and/or Include custom coverages).



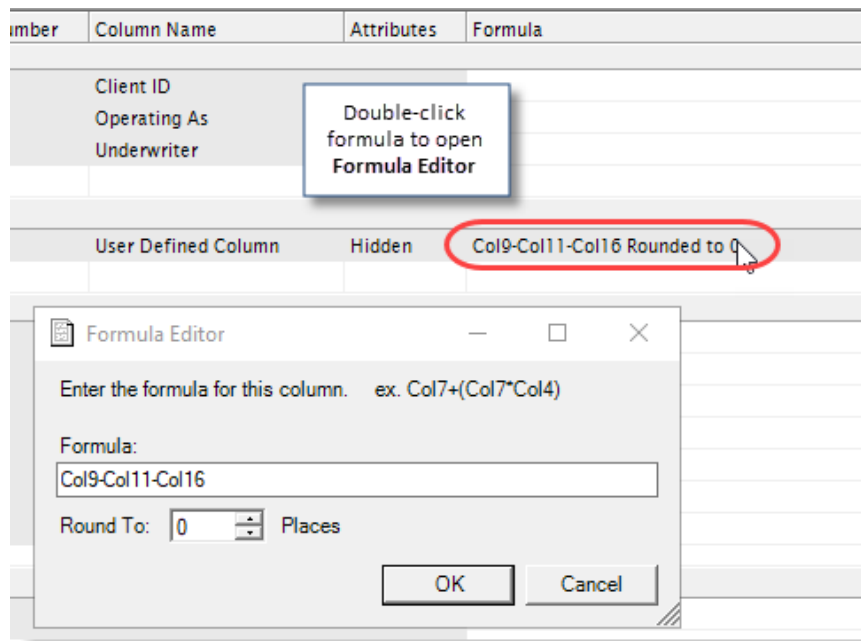
- To manage **Row and Column Attributes**, double-click in the Attributes field in the Field name row. In the Report Column Attributes window, select applicable attribute(s).
 - Add **Apply to all rows** to display this column for all items/lines in the report associated with the same policy. If this attribute is *not* selected, the column will display only in the first row associated with the policy.
 - Add **Hidden** when the column is integral to the report, but you don't want it to appear in the report (e.g. when the column is used to calculate a formula that doesn't need to display in the report). Hidden columns will not be included if the report is printed or exported to Excel.



- Selected Attribute(s) will show in the Attributes field.



Basic formulas can be added to the report with the User Defined Column in the Column Editor. To add or edit a formula, double-click the Formula cell to open the Formula Editor.

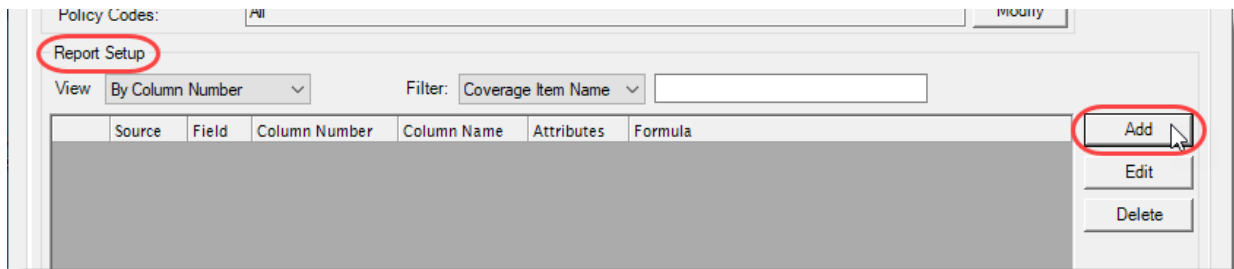


A column that was added in error or is no longer needed can be removed from the report. Select the item and click the Delete button or click the Delete key on your keyboard. Click OK in the Attention pop-up to delete the item.

Column Editor in the Bordereaux Report

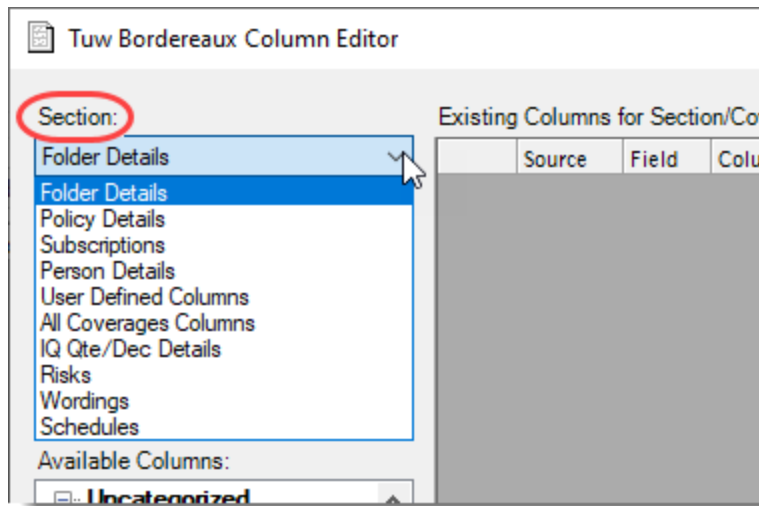
When you are creating or editing a Bordereaux Report, use the **Column Editor** to select and manage columns that will appear in the report.

On the New Report tab in the Bordereaux Report form, click the **Add** button in the Report Setup section to open the Column Editor.

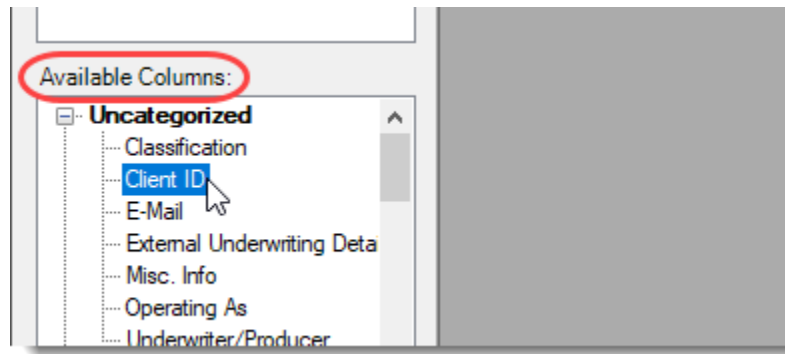


To add a column to the report,

1. Select the **Section**.

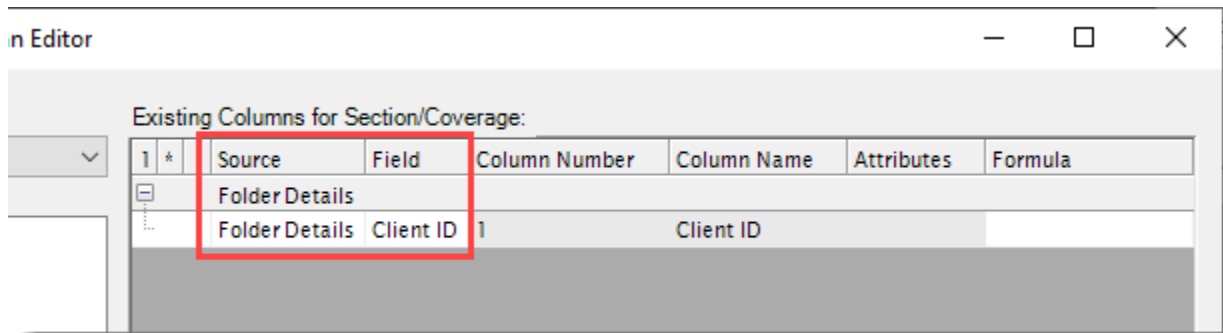


2. For certain Sections (IQ Qte/Dec Details, Risks, Wordings, and Schedules), **Coverages** will display. Select applicable item(s) in the Coverages list.
3. Double-click the target column in the **Available Columns** list.

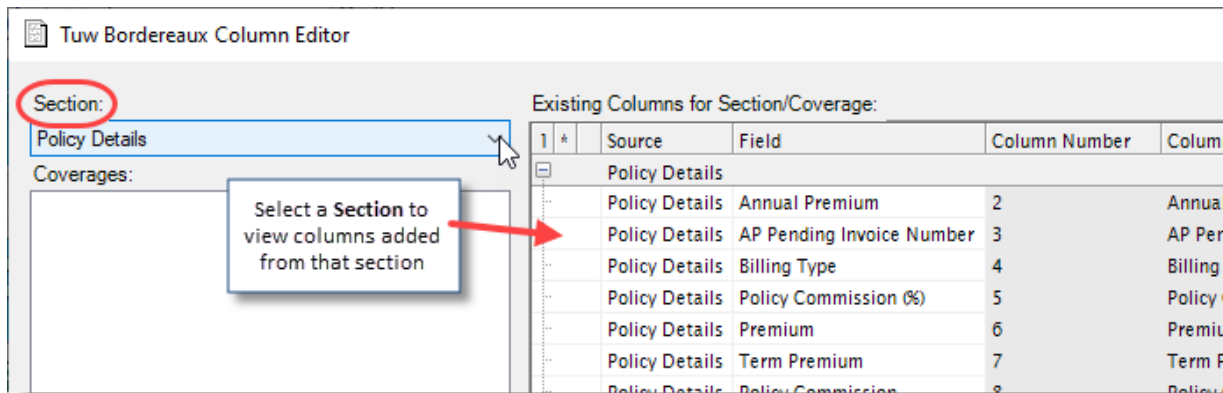


The column will be added to the **Existing Columns** section, with the column section and name showing in the Source and Field fields.

- If you are creating a new report based on an existing report or modifying a report, there may already be columns listed in the Existing Columns section.



Only columns for the selected Section (and Coverages, if applicable) will show in the Existing Columns list. As you are adding columns to the report, select a Section (and Coverages) at any time to view columns that have been added from that section.



The **Column Number** determines where a column will display in the report (e.g. “1” is the first column, “2” is the second column, and so on). To adjust the placement of a column, double-click in the Column Number cell and enter the new number. Other column numbers will adjust automatically.

- Columns can also be renumbered from the main Bordereaux Report window.

Existing Columns for Section/Coverage:

1 *	Source	Field	Column Number	Column Name	Attributes	Form
[-]	Folder Details					
	Folder Details	Client ID	1	Client ID		
	Folder Details	Operating As	9	Operating As		
	Folder Details	Underwriter/Producer	10			
	Folder Details	Agency	11			
	Folder Details	Branch	12			
	Folder Details	Department	13	Department		
	Folder Details	Sub Broker Name	14	Sub Broker Name		

Change the **Column Number** to adjust its placement in the report

The **Column Name** is the name that will appear in the report. If you wish to change it, double-click in the Column Name field, and enter the desired name.

- The column name can also be edited from the main Bordereaux Report window.

Existing Columns for Section/Coverage:

1 *	Source	Field	Column Number	Column Name	Attributes	Formula
[-]	Folder Details					
	Folder Details	Client ID	1	Client ID		
	Folder Details	Operating As	9	Operating As		
	Folder Details	Underwriter/Producer	10	Underwriter		
	Folder Details	Agency	11	Agency		
	Folder Details	Branch	12	Branch		
	Folder Details	Department	13	Department		
	Folder Details	Sub Broker Name	14	Sub Broker Name		

Adjust the **Column Name** that shows in the report

Use the **User Defined Column** option to add a custom column, such as a basic formula to calculate.

Section: User Defined Columns

Existing Columns for Section/Coverage:

1 *	Source	Field	Column Number	Column Name	Attributes	Formula
[-]	User Defined					
	User Defined	User Defined Column	16	User Defined Column		

Coverages:

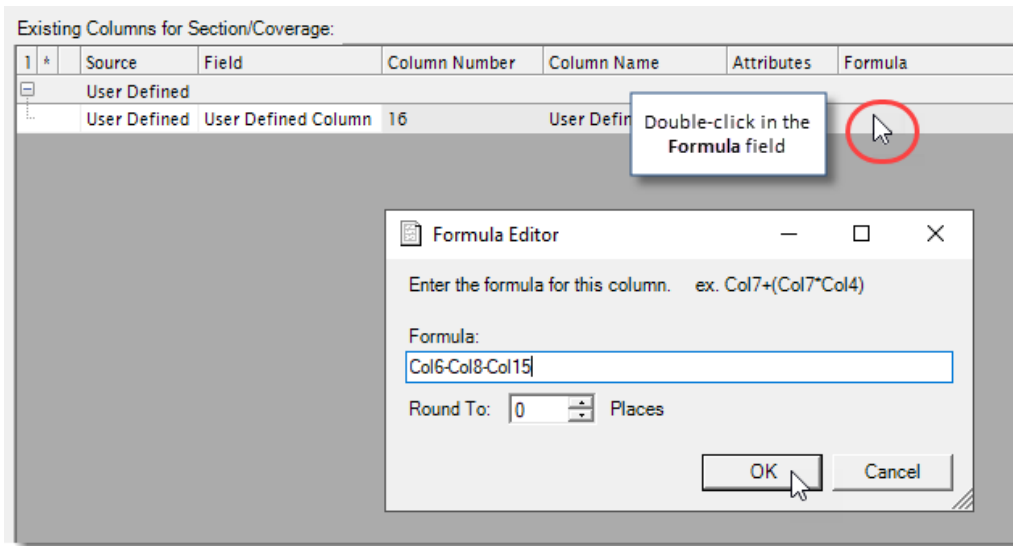
Available Columns:

- [-] User Defined
 - User Defined Column

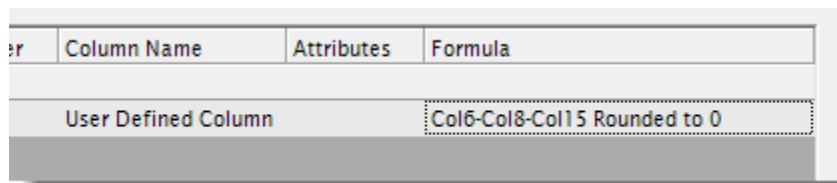
To calculate a basic formula in the column, double-click the Formula field to open the **Formula Editor**. Enter the formula and the number of places to round to and click OK.

- When entering a formula, enter required signs and applicable Column Numbers (entered as "Col__" – e.g. "Col10") with no spaces between components.

- If a column number is changed, it will be updated automatically in the formula.



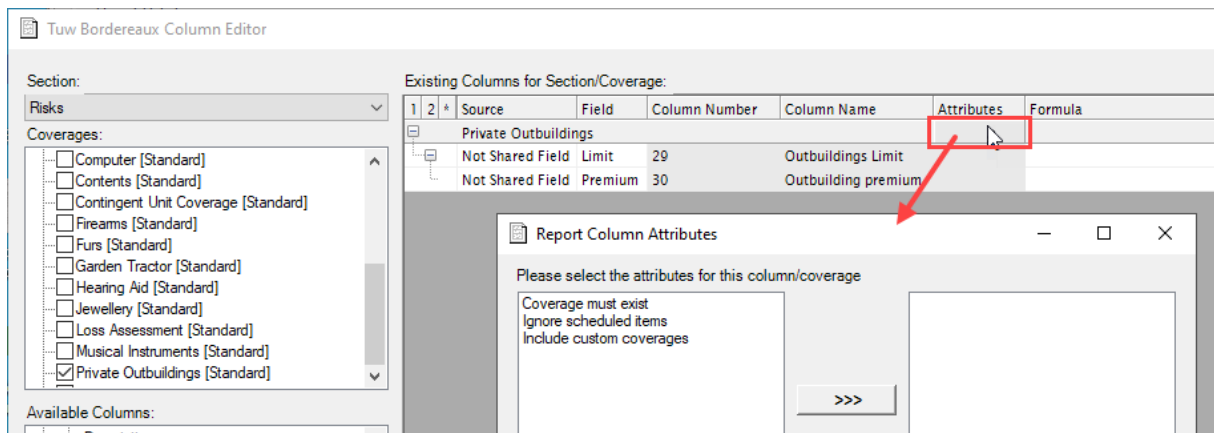
- The formula will display in the Formula field. If you need to edit a formula, double-click it, and make necessary changes in the Formula Editor.



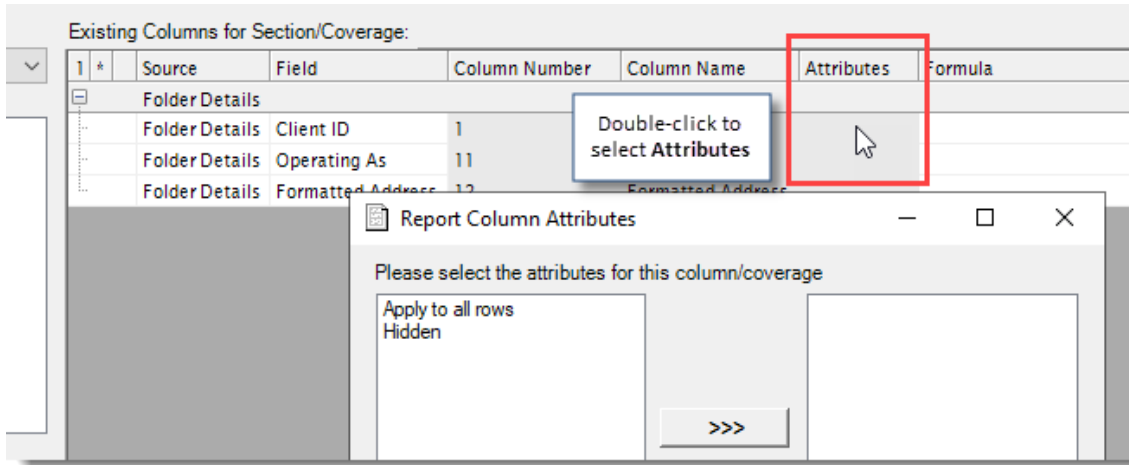
- An Attention pop-up will display if a formula has been entered incorrectly.

The **Attributes** column allows you to manage attributes for the coverage item (Coverage Attributes) and its fields (Row and Column Attributes).

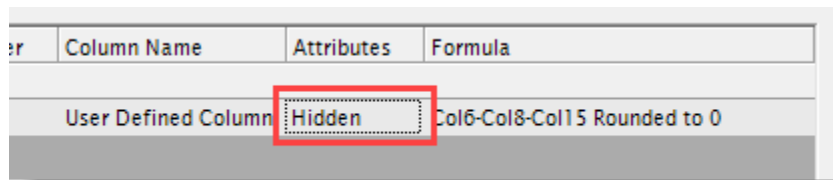
- To manage **Coverage Attributes**, double-click in the Attributes field for the Coverage Name. In the Report Column Attributes window, select applicable attribute(s) (Coverage must exist, Ignore scheduled items, and/or Include custom coverages).



- To manage **Row and Column Attributes**, double-click in the Attributes field in the Field name row. In the Report Column Attributes window, select applicable attribute(s).
 - Add **Apply to all rows** to display this column for all items/lines in the report associated with the same policy. If this attribute is *not* selected, the column will display only in the first row associated with the policy.
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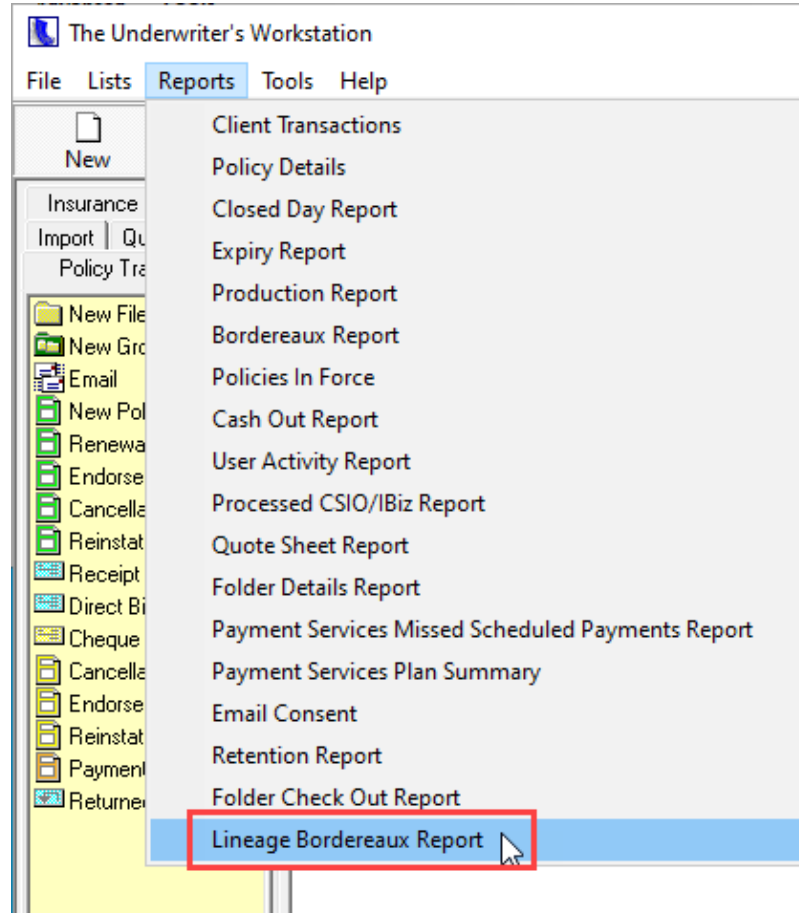


To remove a column from the report, select the item and click the Delete button or click the Delete key on your keyboard. Click OK in the Attention pop-up to delete the item.

Click OK in the Column Editor when you are ready to return to the main TUW Bordereaux Report window. You can return to the Column Editor as needed to add or manage report columns.

Lineage Bordereaux Report

Lineage upload is now accessed directly from the Reports menu (by clicking **Reports, Lineage Bordereaux Report** in the TUW window).



Please share this information with the appropriate TUW users in your office(s). Once you have reviewed this document, if you have any questions regarding these features or need further assistance in their usage, please contact our Client Services Team at clientservices@cssionline.com or 1-888-291-3588 (toll-free telephone).

Thank you for using The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.